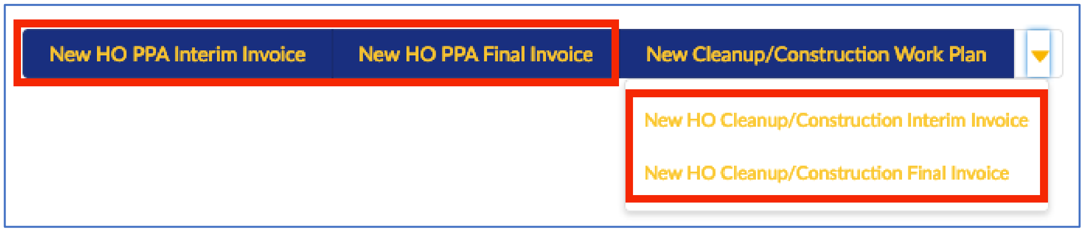
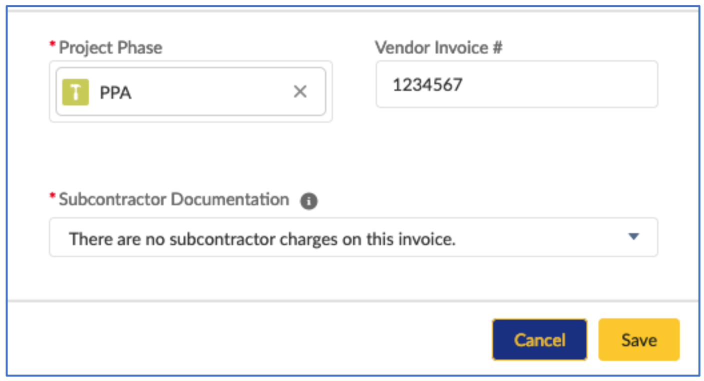
## How to Create a New Heating Oil Loan & Grant Invoice and Submit for Approval

These steps apply to interim and final PPA and Cleanup Construction Invoices. Navigate to the Project. Click the button associated with the type of Invoice you want to create.

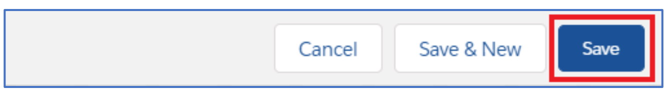



Enter your information.

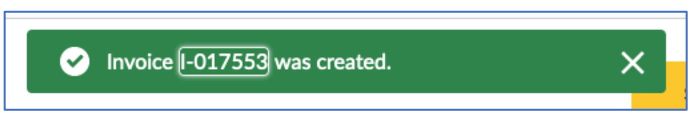
- Project Phase – Enter "PPA" or "Cleanup" and select the record associated with this Project.
- Vendor Invoice # – The Invoice number provided by your company. Optional.
- Fund Source – Cleanup/Construction only.
- Subcontractor Documentation – Select the correct value.




Save.

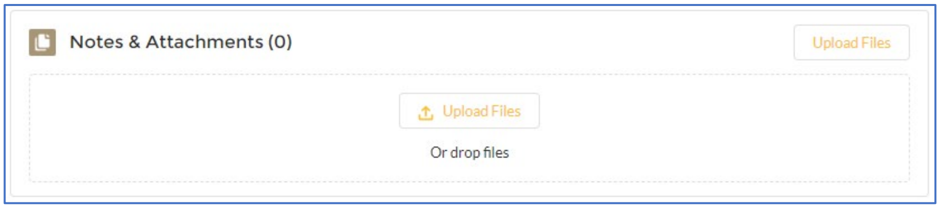



A banner will appear with a link to your new Invoice. Click on the Invoice number (I-######) to open.



## Attach Your Invoice – Optional

If you have an invoice generated by your company that you wish to attach to your PLIA Invoice, scroll down to Notes & Attachments. Drag and drop your file or click Upload Files to select from your computer.

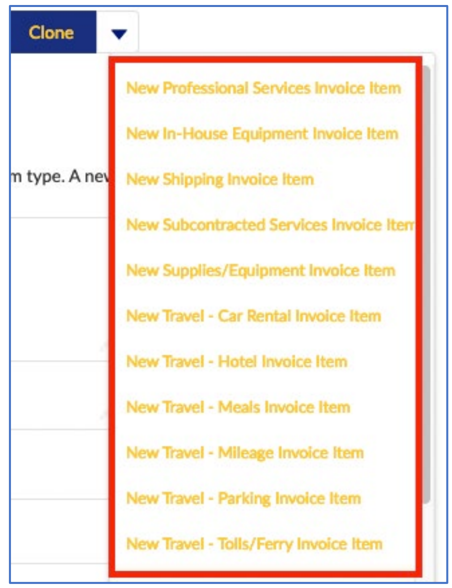



## Create Invoice Items

To add detailed line items to your Invoice, navigate to the Invoice. Click on the arrow next to the buttons and choose the button for the type of Invoice Item you want to create.

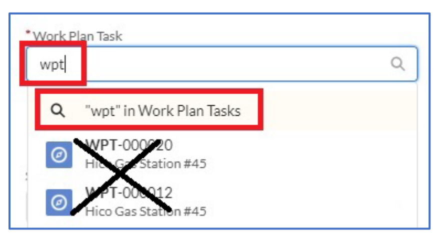
These correspond to different Invoice Item record types. Depending on the record type selected, the form may look different – with different fields, requirements, layout, etc.

These record types can be used only as labeled, e.g., Professional Services cannot be used to create a Subcontracted Services Invoice Item.

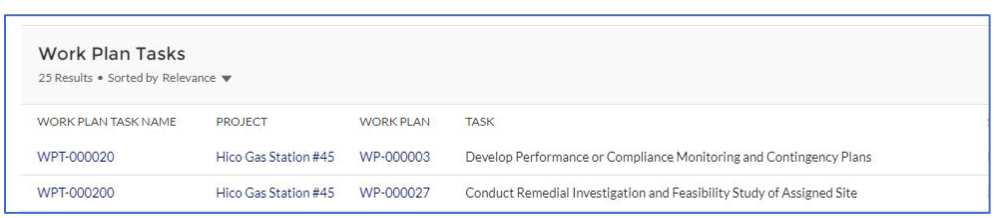



### *Common Fields*

- Invoice Item Name – Not editable. Invoice Name will auto-populate upon 'Save'.
- Invoice – Because you are creating the Invoice Item record from the Invoice, Invoice is auto-populated.
- Type – Auto-populated based on record type.
- Project – Auto-populated
- Project Phase – Auto-populated
- Work Plan Task – Enter WPT and click "'wpt' in Work Plan Tasks" for a list of available Work Plan Tasks.




Click on the Work Plan Task Name to select it.

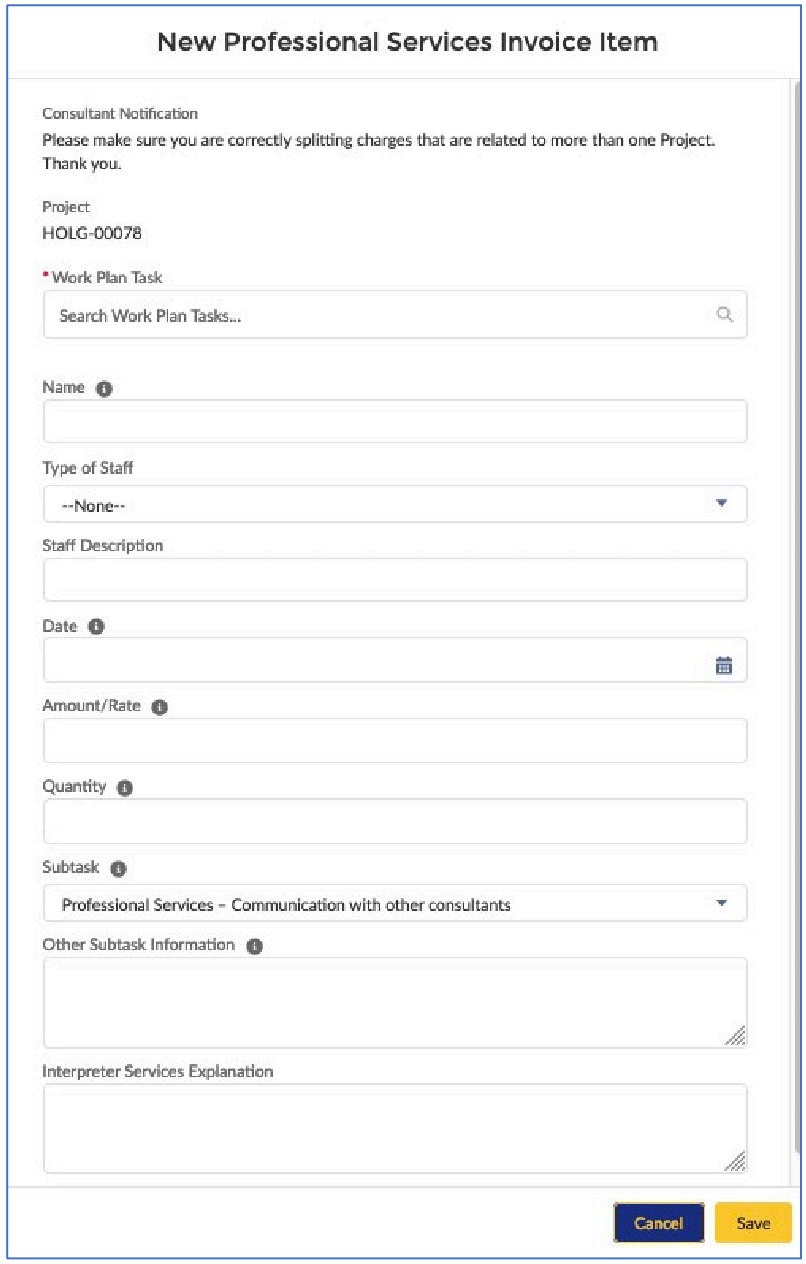


Work Plan Tasks

25 Results • Sorted by Relevance

| WORK PLAN TASK NAME | PROJECT | WORK PLAN | TASK |
|---|---|---|---|
| WPT-000020 | Hico Gas Station #45 | WP-000003 | Develop Performance or Compliance Monitoring and Contingency Plans |
| WPT-000200 | Hico Gas Station #45 | WP-000027 | Conduct Remedial Investigation and Feasibility Study of Assigned Site |

- Amount/Rate
    - Professional Services rate/hour
    - Subcontracted Services amount billed
    - Field equipment rate/day
    - Supplies/equipment cost
    - Hotel room/car rental rate
    - Parking/tolls/ferry amount
    - Shipping amount
- Date – Date of travel, meals, supplies/equipment purchase, shipping purchase, or subcontracted work performed.
- Subtask – This field is required if Subtask is not defined on the associated Work Plan Task record.
- Other Subtask Information – If “Other” was selected for Subtask, provide an explanation.
- Interpreter Services Explanation – complete if needed. Not required.
- Total Amount – Not editable. Auto-calculated.

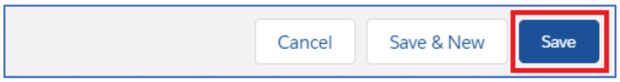



*Fields Dependent on Record Type*

- End Date – Last date of Field Equipment rental
- Location – Location of parking, tolls/ferry, or hotel address
- Markup Amount – For subcontracted services. Markup cannot exceed 10% of Amount/Rate.
- Name – Name of subcontracted company, purchased or rented item, or name of staff for professional services or travel expenses
- Quantity
    - Professional Services hours
    - Mileage: number of miles traveled
    - Car rental days
    - Field equipment days

- Site-Specific Purpose – For Field Equipment and Supplies/Equipment record types
- Start Date – First date of Field Equipment rental
- Travel Expense Type – Auto-populated based on record type
- Type of Work – For subcontracted services
- Vendor Name
    - Car rental company name
    - Hotel name
    - Name of store where supplies or equipment were purchased
    - Name of company renting/providing field equipment
    - Name of shipping company
- Work Day End Time –While in Travel Status
- Work Day Start Time –While in Travel Status

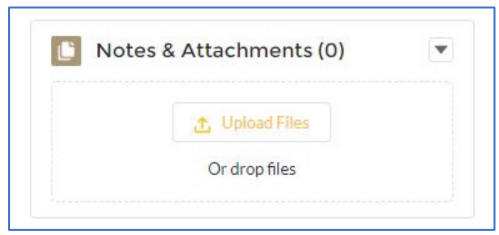
Save.




## Attach Receipts and Documentation

To attach receipts or subcontractor invoices to Invoice Items, navigate to the Invoice Item.

Drag and drop your file in the Notes & Attachments section or click Upload Files to select from your computer.




## Submit Invoice for Approval by PLIA

Once all Invoice Items have been created and receipts and invoices have been attached, navigate to the Invoice. Click Submit L&G Invoice for Approval.


Submitting for approval locks the Invoice and Invoice Item records. During the approval process, the records cannot be edited by the consultant. Approvers are notified via email of the pending approval.